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ABSTRACT

After a decade of institutional turmoil, including a succession of four chief executive officers, efforts were undertaken at one educational institution to identify the cultural dynamics at play in the organization and reframe its approach to management. A brief survey was distributed to over 125 people on the college's management council asking respondents to choose one of five statements that best described the college's place along a quality continuum ranging from dysfunctional society to community. The reaction to the survey reflected the fear and mistrust in the organizational climate, with many respondents concerned about the anonymity of responses or the inability to discuss such matters at the college. As a result of the outcomes, a systems thinking group of the managers used a Vision Development Matrix to help achieve alignment among themselves and the other survey participants regarding responses. The matrix, also completed by the college President, indicated that different groups of managers perceived organizational actions according to the mental models that they employed: those who expected to hear bad news at management council meetings, always heard bad news at the meetings, while those who expected the President to act as a "tough guy" perceived him as that. Efforts were therefore undertaken to address the issues of mental models and systems thinking with the entire management council. (BCY)

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REFRAMING ORGANIZATIONAL THINKING

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presenter biography

James B. Rieley directs The Center for Continuous Quality Improvement at Milwaukee Area Technical College. Through the Office of the President, he directs the internal quality improvement process at the college, has developed and facilitates the Systems Thinking/Organizational Learning efforts, and is the facilitator and architect of the strategic planning process. In conjunction with the WorkForce Development Institute of MATC, he consults with business and industry, government, and educational institutions who have identified the importance of becoming more effective in meeting the needs of their customers.

Rieley, who holds a B.S. degree in business administration, was the president of a successful plastics manufacturing company for over 20 years. After selling his company in 1987, he began to work with organizations in the area of innovation and business organization. In 1990 he accepted an offer to come to MATC to develop the concept that became The Center for Continuous Quality Improvement.

He has written extensively on the subject of quality, having been published in Quality Progress, The System Thinker, National Productivity Review, The Business Journal, Corporate Reports Wisconsin, On The Horizon, and other media, as well as being the author of a research report for GOAL/QPC on Strategic Planning for education titled Closing the Loop, and co-author of an implementation workbook on Institutional Effectiveness. As a result of his work, Rieley was recently nominated for the national Shingo Prize for Excellence in Research.

Rieley, has presented programs and papers at the national GOAL/QPC conferences, the Community College Consortium Summer Institutes, the West Virginia Community College convention, the Georgia Technical College system, the Fox Valley Quality Conference, the International Forum on Quality in Higher Education, the Systems Thinking in Action conferences, the American Association of Higher Education National Conferences, the Sinclair Community College Quality Institute, and the Quality Symposium. Most recently, Rieley was invited to participate in the White House Conference on Corporate Citizenship. He has done facilitation/consulting in strategic planning for the French Ministry of Education, the University of the Virgin Islands, American Association of Higher Education's Coordnet Group, Blackhawk Technical College, the University of Wisconsin System, Chippewa Valley Technical College, and Upper Iowa University.

Rieley is the past President of Milwaukee:First in Quality, a network service of the Metropolitan Milwaukee Association of Commerce; a member of the National Steering Council of International Forum of Quality in Higher Education (Q/HE); on the advisory group to Quality Coordnet of American Association of Higher Education (AAHE); is the midwest learning coordinator for Pegasus-Systems Thinking, and the founder of the Southeast Wisconsin Organizational Learning Consortium (SEWOLC).

Reframing Organizational Thinking

James B. Rieley
The Center for Continuous Quality Improvement

"All of our beliefs justify and are justified by all of our other beliefs. They are connected by an explanatory network, and changes in one place can require changes elsewhere. What we observe can lead us to change any of our beliefs, no matter how certain we may have been that they were true. Our beliefs are protected by something like a one-way glass. The beliefs behind the glass, our *a priori* knowledge, provide justification for the beliefs in front of it, our *empirical* beliefs; but nothing that happens in front of the glass can change what goes on behind it." Jeffrey Olen

Recently, two people who work at a large service provider sat down to try to get a better picture of the cultural dynamics that were at play at the organization. The past several years had been filled with turmoil due to the termination of one President and the subsequent hiring of an interim who had a reputation for being closer to Atilla the Hun than Stephen Covey in leadership styles. After a year and one-half, the interim was made the permanent chief executive officer.

In the past four years, the organization, an educational institution, had gone through massive change. The chief executive officer, the fourth in the last decade, was brought in to "clean up the mess" left by the previous president that had put the long-term future of the organization at risk. Although there were assurances given at the beginning of the executive search by the organization's Board that whoever became the interim would not be eligible to be considered to be the permanent CEO, the interim was asked to be the permanent president. Even though he was a very competent administrator, the organizational culture continued in a form of semi-debilitating shock; the level of trust was low, there were daily rumors about potential firings, and there were few in the organization who felt "safe" to take risks.

In September 1994, one of the two people, the director of CQI in the organization, saw an article in *The Systems Thinker* titled "Creating a New Workplace" written by Greg Zlevor. The article put forth the position that all organizations operate at some point along a "community continuum." The positions along the continuum went from "disciety" (dysfunction society), to "community." The CQI director believed that in order to improve the organizational climate, the organization first needed to identify where they were on the continuum. He wanted to introduce the material to the senior and mid-level administrators of the college at a management meeting. Before introducing the materials, however, he shared the article and his plan with the director of research for his perspective. The two decided to do a management survey to

determine the current position of the organization along the continuum developed by Zlevor. The survey that was put together that afternoon was admittedly "quick and dirty," but designed to identify a "place" on the continuum at which the managers thought the organization was and, therefore, a starting place for discussion. The survey was mailed to the entire management council of the college (125+ people). That is when the excitement began.

The survey, printed on letterhead of the CQI office, consisted of an opening statement that said, "Please indicate by checking the appropriate box, which statement best describes your perception of the current environment at" the organization. The boxes were located next to the statements that Zlevor had stated were indicators of an organizations position along the community continuum. The potential positions were identified by the verbiage that Zlevor had used in the article; and included the following:

- *This is war. Every person for him or herself;*
- *This place is so political. I see glimpses of kindness but usually feel beat up, I protect myself;*
- *I do my part, they do theirs. As long as I keep to myself and do my job, I'm ok;*
- *People cooperate. We have our ups and downs, but mostly ups. There's a fair amount of trust. I can usually say what is on my mind;*
- *I can be myself. I feel safe. Everyone is important. Our differences make us better. We bring out the best in each other.*

There was no reference in the survey to the article in TST, no reference to the "community continuum" or the association of the indicators to the positions along the continuum. This was a conscious decision, as no one else in the organization had read the article at that time and the two believed that this would just cloud the responses. The phone calls began the next morning.

The concerns of the callers seemed to revolve around the fact that the indicator statements were considered to be relatively "undiscussables" in the organization. Some callers were concerned that their names were on the survey, due to the internal mail routing labels, and questioned the confidentiality of the survey. Some callers wanted to know if the survey was being done at the behest of the President (the quality office reports directly to the college President; although the President did not have prior knowledge of the survey or its distribution). Some callers said it was about time that the organization was beginning to talk about these issues.

When the surveys were returned (over 85% response), they were put into five piles, each representing a "place" along Zlevor's continuum. They were totaled, then each pile was recounted to determine how many respondents felt compelled to remove their names from their response. There was no effort to determine who said what, nor was there an effort to determine who even responded. The results were tabulated and formatted into a histogram for

dissemination. The results were quite interesting; almost perfectly symmetrically bi-modal. At the next meeting of senior administrators, the two "risk-takers" de-briefed the thirty five attendees, all recipients of the survey, on the survey results. The group dynamics were as revealing as the survey results themselves. The most vocal people in the meeting were more concerned about why they weren't told about the article than the content of the article itself, and they questioned the validity of the survey itself. Their reaction was a reflection of the climate of the organization; fear, mistrust, and high level of defense mechanisms in place. The meeting participants seemed to feel that the entire survey episode was best forgotten. It would not be.

Reframing the Work

The college has a group of people (the STOL group) who self-formed early that year to learn more about systems thinking concepts and tools. Since the group had been using different case studies to hone their system thinking skills, the survey was brought to their attention as a good opportunity to explore the larger dynamics that were at play. However, the group quickly realized that their work on this "project" was more important than just another case study - it really involved reframing the thinking of the entire organization.

To provide a framework for this work, the team used several tools, including causal loop diagrams and the "Vision Deployment Matrix," first articulated by Daniel Kim in an article in *The Systems Thinker* in early 1995. This tool, developed to be used for deployment, was used by the group as a tool to achieve alignment among themselves and eventually the larger population who participated in the survey in how to reframe their collective thinking regarding the survey outcome.

Each member of the STOL group (nine people) filled out the first two vertical columns of the matrix individually using their frames of reference (the group is a good cross-sectional representation of the management of the organization). At the next weekly meeting of the group, they then began to build a collective matrix, using their individual matrices for input. One group member would read the target matrix position description, and then each group member would in turn read what they had placed in that position of the matrix. The goal of this exercise was to achieve alignment within the group. After filling out the first two vertical columns of the matrix, they stopped. At that point, the group determined that they wanted to get a different perspective on the matrix positions.

The CQI director showed the matrix to the President at one of his regular briefing weekly meetings. After a short explanation of the matrix, how it functioned, and what it would mean, the President filled out the first two columns of the matrix from his perspective. This would become an extremely important

signal to the group, due to what he said on the matrix, and the fact that he was willing to participate.

The President, formerly the interim and now the permanent chief executive officer, was initially hired to repair the damage that had been done previously; in this process, he did not exactly improve his image as being a "nice guy." However, since becoming the permanent President, he had been working actively to change the institution by following the direction set forth by the strategic plan (developed by a cross-sectional group of internal and external customers). This plan, based on the Hoshin planning process and facilitated by the CQI director, had and continues to, focuses on a few, but highly significant goals that will help move the college toward its vision for the future. The two principle goals were Improve Leadership and Implement Continuous Quality Improvement. The plan articulates both CQI principles and cultural changes that needed to be done. The commitment of the President to make this change happen was strong and evident.

The fact that the President, who was briefed on the work of the STOL group, would be willing to participate in this process of helping to reframe the organization was very positive. He had expressed his concerns regarding the organizational culture and supported the work of the group. Upon examination of the matrix responses of the President, the group determined that they were in alignment with the collective STOL group matrix. This feedback was given to the President, and then the group then began to continue filling out the balance of the matrix, while at the same time working on ways to improve the organizational understanding of what the organizational dynamics were that were causing the repeated patterns of behavior that were not conducive to being an effective organization well into the next century.

At the next meeting of the entire management council, the STOL group all participated in a "left-hand column" (LHC) exercise as the President gave a presentation on issues facing the organization. The results of this exercise confirmed much of what the group believed was going on organizationally.

The left-hand column showed that the organization was hearing what it expected to hear depending on the mental models (theories in use) of the different management population groups. The people who only expected to hear "bad news" heard just that; the people who expected to see only a "tough guy" saw just that; the people who were open to the organizational changes that were happening saw the changes as "positives" for the college.

In one specific situation, the President was articulating the CQI principles that had been developed by a project team. Some of the meeting participants believed that the President was "talking at them" regarding the principles, and

not willing to act them out himself. Others saw this as a real positive change for the future of the entire organization. Unfortunately, there are no right answers as to what to do in this type of situation (a fact that the STOL group kept telling themselves as they got deeper and deeper in their work). The group determined that what needed to be done was to develop options for the President that would help him deal with the organizational dynamics. These recommendations would be targeted at how to change the mental models of the employees who were having a hard time with the issues that the organization was dealing with.

This is a critical step in reframing the thinking of the organization, while it was the employees' *perceptions* that were creating the organizational cultural framework, it was the behaviors of the employees based on those perceptions that created the working environment.

The STOL group has continued their work, developing recommendations for the President (that he is implementing, both organizationally and personally) on how to help improve the organizational climate. At the next meeting of the management council, the first item on the agenda was mental models. This presentation was designed to be largely informative, giving the managers a light background in mental models and how they affect the organization through its people. The subsequent management council meeting was devoted to systems thinking at the request of the President.

In this meeting, two college-wide issues that were generally considered to be undiscussables were the only agenda items. The issues, how to better implement the entire CQI process, and the positive and negative changes seen in the organization in the past several years, were given to the large group for the purpose of working on developing solutions instead of just "whispering" about them. The process used was small group facilitated dialogue. The issues became open when the issues developed in small groups were shared with the entire group both verbally and visually.

A key step in this process was the division of small groups. The makeup of each small group was pre-targeted to eliminate the potential for closed thinking opportunities. By ensuring cross-sectional dialogue in the smaller groups, the potential for changing mental models increased dramatically (see Organizational Interaction Dynamics). The outputs were shared with the President at the end of the meeting (he was not present to ensure open communications), and have been forwarded to the CQI Steering Committee of the college for the development of a plan on how to leverage the positive changes and deal effectively with the negative changes. The evaluations of the meeting were high, with many comments about the fact that the college was "finally moving forward."